

## Overview

From 2000 all tertiary providers that receive EFTS funding or that enrol students receiving Student Loans or Allowances must return the Single Data Return to the Ministry of Education. The Take2 student management software supplied by Meta Office enables providers to make the return, and Take2 users are supplied with documentation that describes how to use Take2 for this purpose.

However, successfully completing a Single Data Return (SDR) involves more than just using Take2. There are other tasks to be carried out correctly and in sequence. This Tip Sheet is supplied to Take2 users to help them through the tasks.

## A Caution!

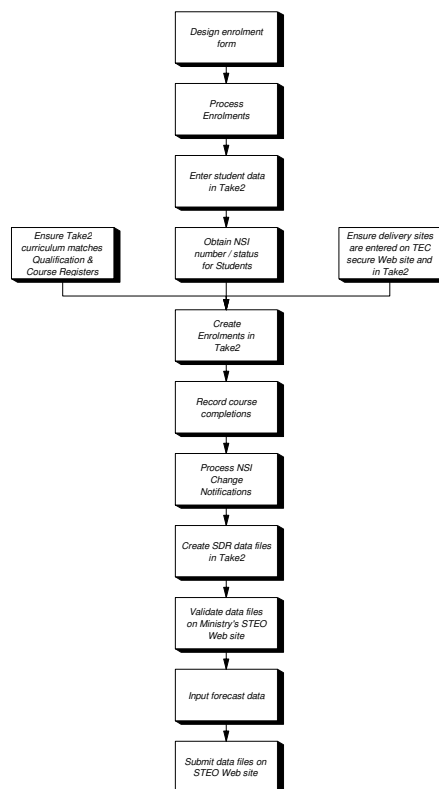
The Take2 software has been comprehensively tested by Meta Office to ensure its compliance with the Ministry's specification. Take2 is has been certified by the Ministry as being compliant. But, as pointed out above, using Take2 is only one task in a series of tasks involved in completing the SDR. For example, another step is using the Ministry's validation software to test the content (as opposed to the format) of the data files produced by Take2. It follows, then, that that if you have problems with your SDR the cause of those problems is less likely to be related to software (Take2 or the Ministry's validation software) than to the quality of the data input into Take2 or the status of your Course Register on the TEC Web site. Which is not to say that there are definitively no bugs in Take2 or the Ministry's software (we're confident but not stupid), but simply to say that the quality of data is the cause of most problems.

## Trial SDR

Given the caution above it is very strongly recommended that you do a trial SDR process before each return. Indeed, you might like to think about doing a trial SDR each month. Normally the trial will consist of preparing and validating your SDR files but not actually submitting them to the Ministry. In other words, go through all the steps but the last in the diagram below.

## Overview

The diagram below gives an overview of the tasks to be carried out to successfully complete the four monthly (April, August, December) SDR.



## Getting Help

Take2 users who subscribe to the help desk service offered by Meta Office may contact the help desk on any working day between 8:30am and 5:00pm. We will do our best to help you, not only with using Take2 but also with the other tasks associated with preparing the SDR.

Take2 Helpdesk contact details:           Phone 04 939-1267  
  Fax 04 386-3519  
  Email [helpdesk@meta-office.com](mailto:helpdesk@meta-office.com)

The Ministry of Education runs a tertiary help line and can be contacted on 0800 422 599 or email [tertiary.help@minedu.govt.nz](mailto:tertiary.help@minedu.govt.nz).

## Documentation

If you are preparing a Single Data Return you should have copies of these documents:

- Take2 User Manual version 10.6
- Tertiary Funding Guide 2006 – available on-line on the TEC website.
- [Single Data Return Manual 2011](#) - Version 1.0 (dated December 2010)

## Jargon

Tertiary education is full of jargon. Here are some acronyms and terms you may come across in the Checklist and elsewhere when dealing with the SDR. The TEC publication, Tertiary Funding Guide, contains a section that defines terms and phrases. Please note that the definitions supplied below may differ from the TEC's own definitions. This is because an attempt has been made to create definitions that are relevant to persons working with a provider.

<b>Completion</b>	The word "completion" is used by the Ministry of Education and TEC with different meanings in different contexts, so BEWARE. A "qualification completion" is achieved by a student who has passed all the academic requirements for the completion of a recognised qualification. A "course completion" is something else again. A student completes a course when they have been delivered tuition and been assessed. If they pass the assessment then they have "completed successfully". If they do not pass the assessment they have "completed unsuccessfully". A student withdraws from a course before their planned finish date, they have not completed the course. See page 91 of the Single Data Return Manual for more information on course completion definitions. The TEC Funding Guide also has definitions, some of which differ from those in the SDR Manual! We recommend you use the SDR Manual.
<b>Course</b>	A course is a strange beast that is normally smaller than a qualification and which is used by the TEC as a mechanism for managing the EFTS funding system. A course has an EFTS factor and is assigned to a funding category, funding classification, and an NZSCED classification. Some providers match their own subjects/modules/units directly to courses on a one-to-one basis. Some providers cluster their own subjects/modules/units together to create courses.
<b>EFTS Factor</b>	A course has an EFTS factor. It is a number (to 4 decimal places) that corresponds to the proportion of 1 EFTS that a student's enrolment in a specific course generates.
<b>Course Register</b>	A list of courses offered by providers, maintained by TEC. At each SDR you supply details of the courses you students are enrolled in. This data must match the courses in the TEC Course Register. You can update your Course Register at any time from the TEC's Website. At this site you can enter details of new courses and submit changes for existing courses.
<b>Data Files</b>	The computer files that you must return to the Ministry as part of the SDR. The other thing you have to return is a signed summary. There are five data files: the student file, course register file, course enrolment file, and course completion and qualification completion file are returned each four months as at 30 April, 31 August, and 31 December.

<b>Delivery Site</b>	No, not the maternity suite. TEC requires that every enrolment is assigned to a course delivery site. You should have assigned a code for every location in which teaching, instruction, and learning occurs for your courses. The code is then used when creating an enrolment in Take2. Normally distance education students are assigned to delivery site code "98".
<b>Disaggregation EFTS</b>	Breaking up a qualification into courses, each of which has an EFTS factor Equivalent Full Time Student. A full time student who studies for one year generates 1 EFTS.
<b>EFTS Funding</b>	Student Achievement Component funding used to be called "EFTS funding" and you will still hear people refer to it in this way. The Student Component funding is delivered by TEC to providers with appropriately approved qualifications. The Single Data Return (SDR) is the mechanism whereby providers inform TEC of the number of EFTS they have generated, and therefore the funding to which they are entitled.
<b>EFTS Value</b>	A qualification has an EFTS value agreed by the provider and TEC. For example, a three-year diploma would normally have an EFTS value of 3.0000.
<b>NSI Status</b>	Students reported in the SDR must have a National Student Index Number or NSN. This number doubles as the Record of Learning (ROL) Number used by NZQA. A student has an "active" NSI status if their identity and residency status have been verified on the NSI database.
<b>NZSCED</b>	New Zealand Standard Classification of Education. From 2001 all courses in your Course Register must be classified using this new system.
<b>Qualification</b>	The big thing a student enrolls in e.g. "Happy Days Institute Diploma in Brain Surgery" or "National Certificate in Hairdressing". Each qualification that you are approved to offer (and for which you may receive Student Component Funding) must be recorded in the Qualification Register.
<b>Qualification Register</b>	A database maintained by TEC/Ministry of Education which lists all qualifications approved by the TEC and offered by tertiary providers. The Qualification Register used to be known as "Prospectus".
<b>Student Component Funding</b>	"Student Component Funding" is delivered by TEC to providers with appropriately approved qualifications. The Single Data Return (SDR) is the mechanism whereby providers inform TEC of the number of EFTS they have generated, and therefore the funding to which they are entitled.
<b>Type D Students</b>	This is a tricky one. The amount of data that has to be reported in the SDR for each student varies depending on what "type" of student it is. There are three types, B, C, and (you guessed it) D. What defines each type of student is described in detail in the SDR Manual but, in a nutshell, it's a student enrolled in a formal qualification (either a national or local qualification) who studies for the equivalent of a week or more full-time. The thing about type D students is that they must have an NSI status of "Active" before you make your SDR.
<b>Validation</b>	A process of checking items of data to ensure that they comply with a specification. For example, when the student data file is validated, one check is to ensure that each student has a gender code that is either "F" or "M". Each validation check returns one of three outcomes: "E- Error" – the data fails miserably and therefore you cannot send it to the Ministry or "W – Warning" the data doesn't fit the specification but the Ministry will accept it. The third outcome is "no problem", i.e. the data fits the specification.
<b>Zip File</b>	If the SDR files that you create with Take2 are large it is sensible for you to "zip" them up into a single zip file. This is a special file format that compresses one or more large files into less disk space.